Colorado Medical Assistance Program Web Portal

Data Maintenance User Guide

Sometimes you will need to change (update, add, or delete) the client and provider information or find a provider. These functions are available from the Main Menu of the Portal, on the left side of the screen, under Data Maintenance and Medicaid Provider Lookup.

- Client Maintenance
- Provider Maintenance
- Medicaid Provider Lookup

Client Maintenance

The Client Lookup screen (Figure 1) allows you to:

- Search for a client to either update or delete the client information, or, to see if a client exists in the database before attempting to add it.
- Add a new client.

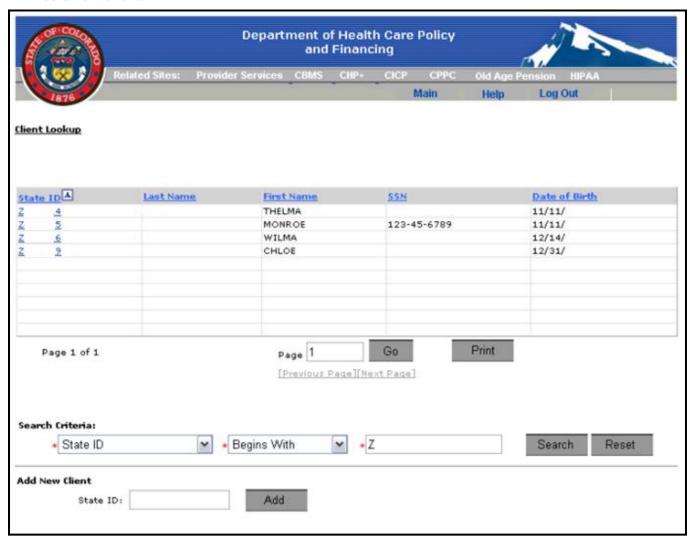


Figure 1 - Client Lookup screen

Using the Display Grid

The display grid in the middle of the screen contains columns of information that can be:

- Sorted Click on any of the column titles to sort the display grid by that column and click it again to sort it back.
- Scrolled Click on the [Previous Page] or [Next Page] links below the grid.
- Skipped Type the screen number in the box below the grid and click **Go** to jump to the screen number specified.

Search for a Client

- Select a column (State ID, Last Name, First Name, SSN) in the first search box by using the dropdown button.
- Select a search method (Exact Match, Begins With, Contains) in the second box.
- Type in the characters to search by in the last box (Figure 2).

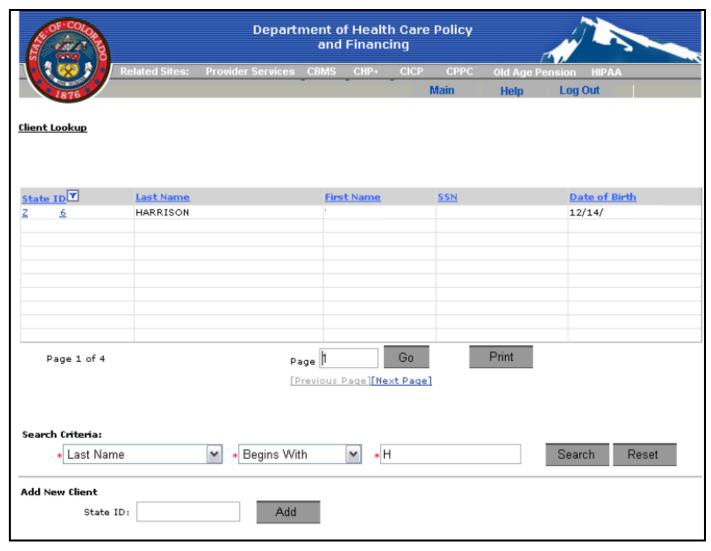


Figure 2 - Search example by Last Name beginning with the letter H

• Click on the **Search** button to process your request – the results will appear in the display grid (Figure 3).

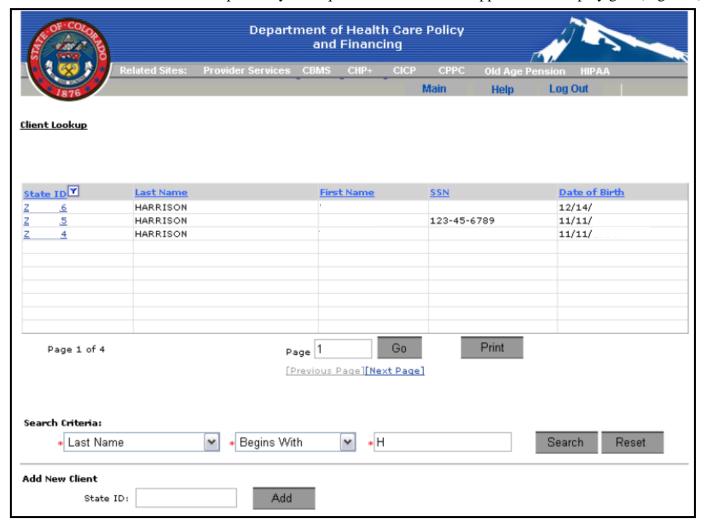


Figure 3 - Search results

• Click on the **Reset** button to clear the search results and return to the default view of the display grid.

Using the Client Maintenance Screen

There are two ways to open the Client Maintenance screen:

- Perform a search to display the client in the grid and click on the **State ID** link.
- Enter a new **State ID** in the **State ID** entry box at the bottom of the screen and click on the **Add** button. If the client number already exists, an error will display (Figure 4).

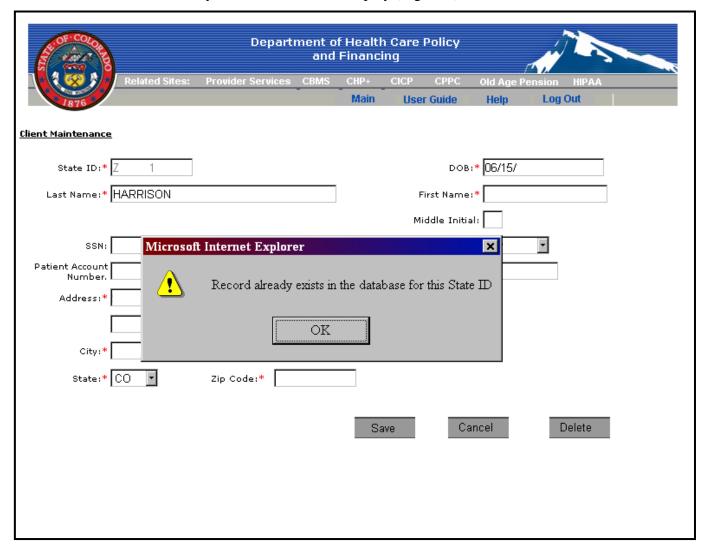


Figure 4 - Error message when adding a new client when the client number already exists

- Click on the **OK** button.
- Click on the Cancel button to return to the Client Lookup screen. The information for the existing client will not be changed.

The Client Maintenance screen allows you to update or delete client information or add the required information for a new client in the database.

• If updating the client information, make the necessary changes in the entry boxes and click on the **Save** button (Figure 5).

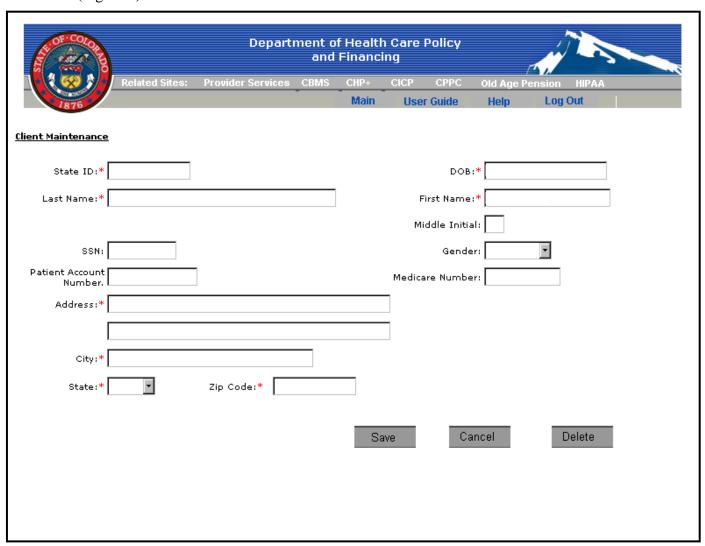


Figure 5 - Client Maintenance screen open for editing

• If deleting the client, click the **Delete** button. A delete confirmation box will appear (Figure 6). Click on **Ok** to process the request.

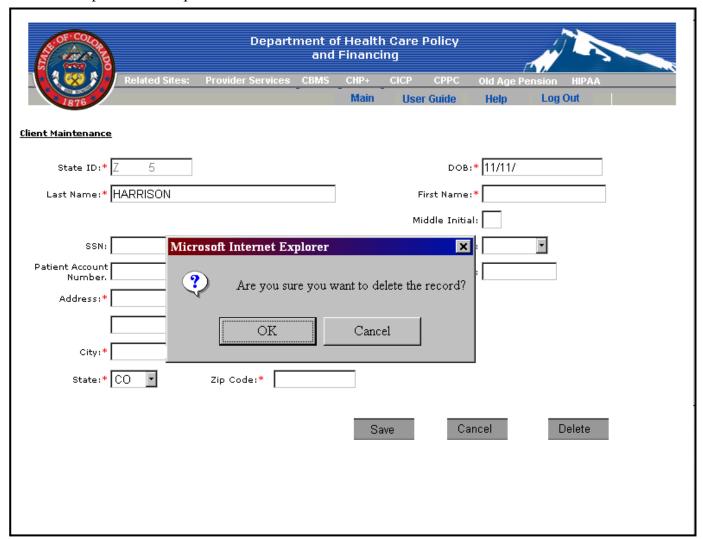


Figure 6 – Delete confirmation box

• A previously deleted client may be restored to the database. To restore a deleted client, enter the **State ID** in the **State ID** entry field on the Client Lookup screen and click the **Add** button. The system will respond by displaying the deleted client information with a dialog box confirming the restoration of the record (Figure 7). To restore the client, click on the **OK** button. Click on **Cancel** to keep the client deleted.

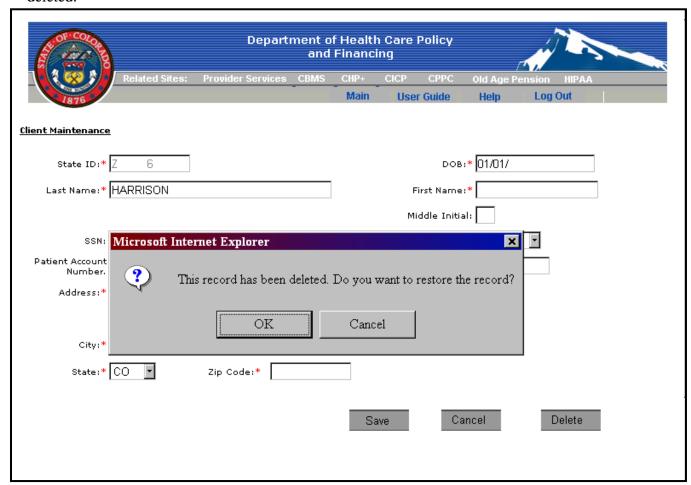


Figure 7 – Restoring a deleted client

• If adding a new client, enter the **State ID** in the **State ID** field on the Client Lookup screen and click on the **Add** button. Enter the required information on the Client Maintenance screen and click on the **Save** button. Although not required in the Client Maintenance screen, assign a **Patient Account Number** due to it being required when submitting claims. If errors are encountered when the **Save** button is clicked, the errors will display in red at the top of the screen (Figure 8). Correct the errors and click on the **Save** button.

	Department of Health Care Policy and Financing								
Related Sites:	Provider Services	CBMS	CHP+	CICP	CPPC	Old Age I	Pension	HIPAA	
1876			Main	User	Guide	Help	Log C	Out	
Client Maintenance									
Last name must be entered Address Line 1 must be enter First name must be entered City must be entered Zip Code must be entered Date of Birth (MM/DD/YYYY) n									
State ID:* 7					DOB	*			
Last Name:*				Fi	rst Name	*			
				Mic	ddle Initia	al:			
SSN:					Gende	ır:	*		
Patient Account Number.				Medica	re Numbe	er:			
Address:*									
City:*									
State:* CO 🔻	Zip Code:*								
			Sa	ave	Ca	incel	D	elete	

Figure 8 - Possible errors when saving a new client

• Click on the Cancel button if you want to return to the Client Lookup screen and not change or save the client information.

Provider Maintenance

The Provider Lookup screen (Figure 9) allows you to:

- Search for a provider to either update or delete the provider information or to see if a provider exists in the database before attempting to add it
- Add a new provider

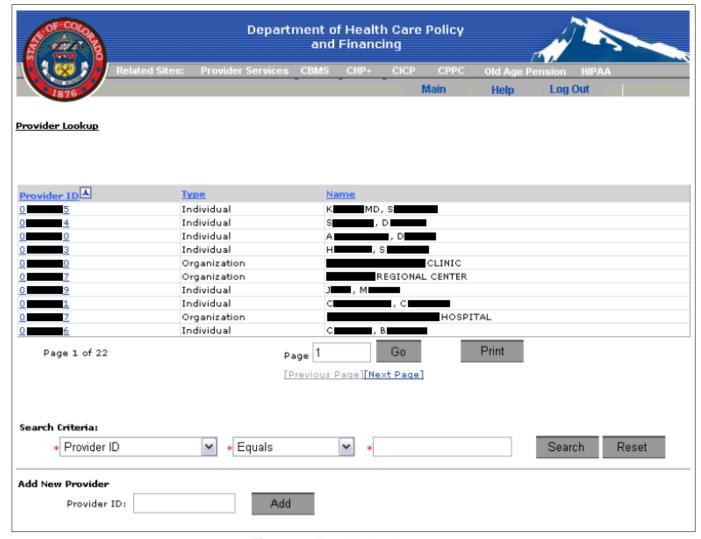


Figure 9 - Provider Lookup screen

Using the Display Grid

The display grid in the middle of the screen contains columns of information that can be:

- Sorted Click on any of the column titles to sort the display grid by that column and click it again to sort it back.
- Scrolled Click on the [Previous Page] or [Next Page] links below the grid.
- Skipped Type the screen number in the box below the grid and click **Go** to jump to the screen number specified.

Search for a Provider

- Select a column (**Provider ID**, **Type**, **Name**) in the first search box by using the drop-down button.
- Select a search method (**Exact Match**, **Begins With**, **Contains**) in the second box.
- Type in the characters you want to search in the last box (Figure 10).

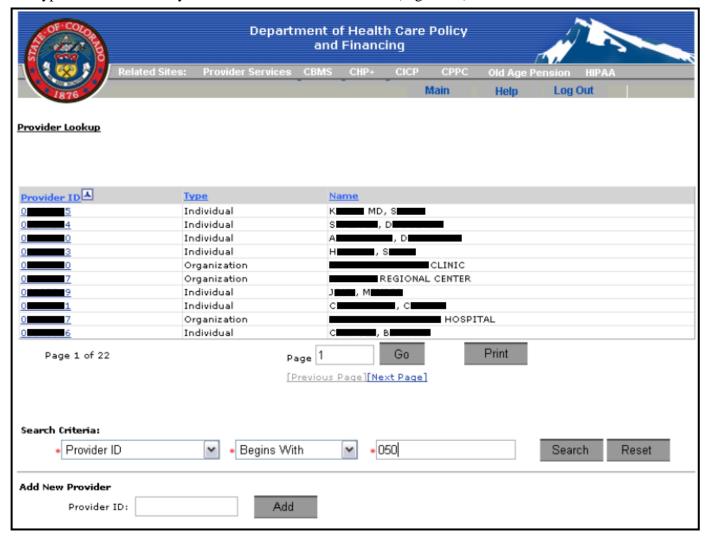


Figure 10 - Search example by Provider ID beginning with 050

• Click on the **Search** button to process your request – the results will appear in the display grid (Figure 11).

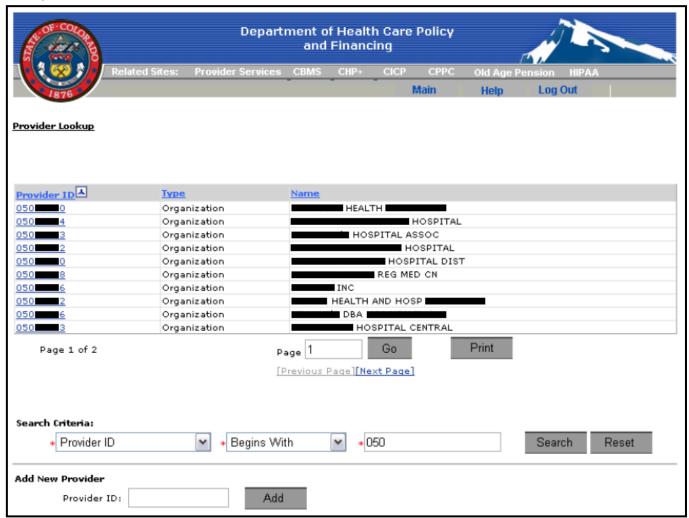


Figure 11 - Search results

• Click on the **Reset** button to clear the search results and return to the default view of the display grid.

Using the Provider Maintenance Screen

There are two ways to open the Provider Maintenance screen:

- Perform a search to display the provider in the grid and click on the **Provider ID** link.
- Enter a new **Provider ID** in the **Provider ID** entry box at the bottom of the screen and click on the **Add** button. If the provider number already exists, an error will display (Figure 12).

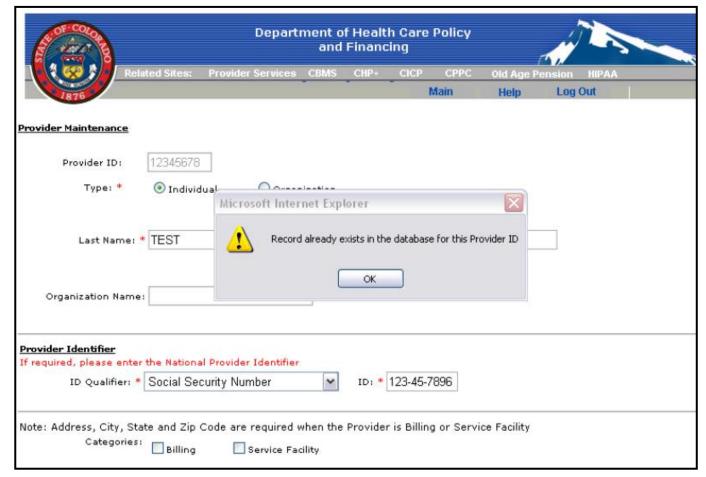


Figure 12 - Error message when adding a new provider when the provider number already exists

- Click on the **OK** button.
- Click on the Cancel button to return to the Provider Lookup screen. The information for the existing provider will not be changed.

The Provider Maintenance screen allows you to update or delete provider information or add the required information for a new provider in the database.

• If you are updating the provider information, make the necessary changes in the entry boxes and click on the **Save** button (Figure 13).

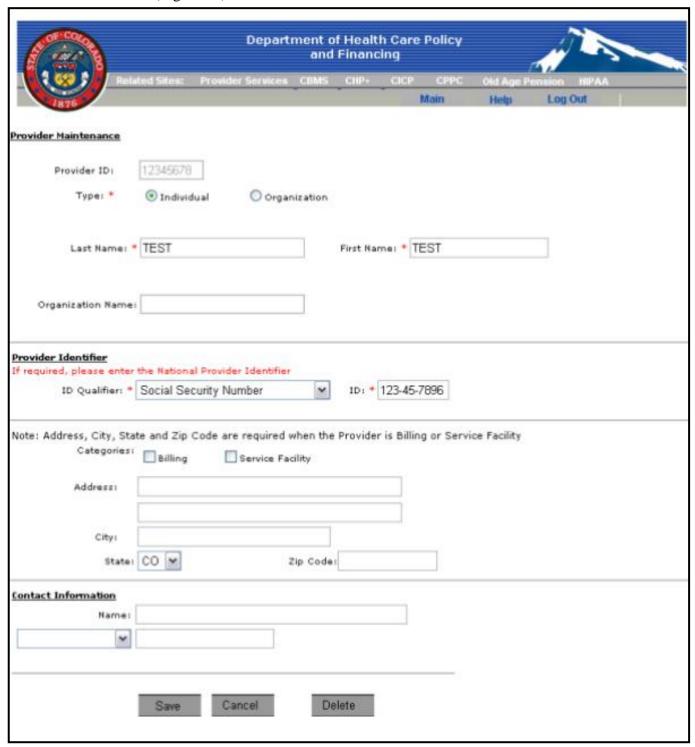


Figure 13 – Provider Maintenance screen open for editing

• If deleting the provider, click the **Delete** button. A delete confirmation box will appear (Figure 14). Click on **OK** to process the request.

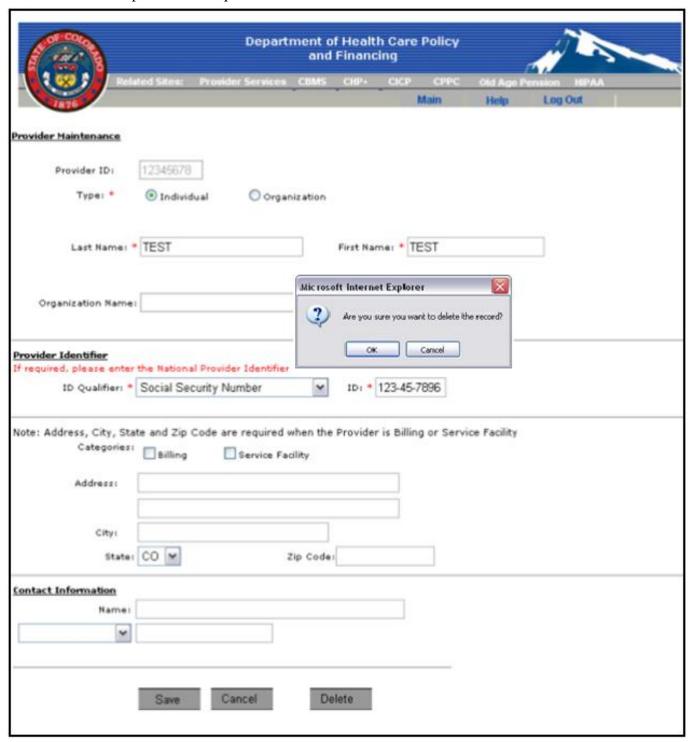


Figure 14 - Delete confirmation box

• A previously deleted provider may be restored to the database. To restore a deleted provider, enter the **Provider ID** in the **Provider ID** entry field on the Provider Lookup screen and click the **Add** button. The system will respond by displaying the deleted provider information with a dialog box confirming the restoration of the record (Figure 15). To restore the provider, click on the **OK** button. Click on **Cancel** to keep the provider deleted.

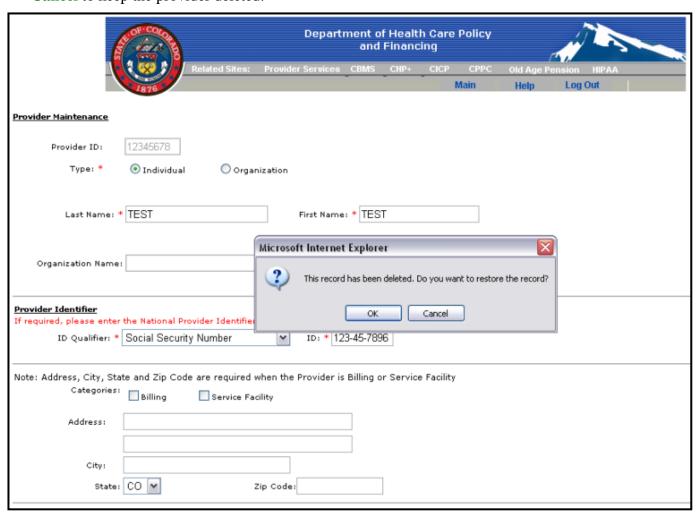


Figure 15 - Restoring a deleted provider

• If adding a new provider, enter the **Provider ID** in the **Provider ID** field on the Provider Lookup screen and click the **Add** button. Enter the required information on the Provider Maintenance screen and click on the **Save** button. If errors are encountered when the **Save** button is clicked, the errors will display in red at the top of the screen (Figure 16). Correct the errors and click on the **Save** button.

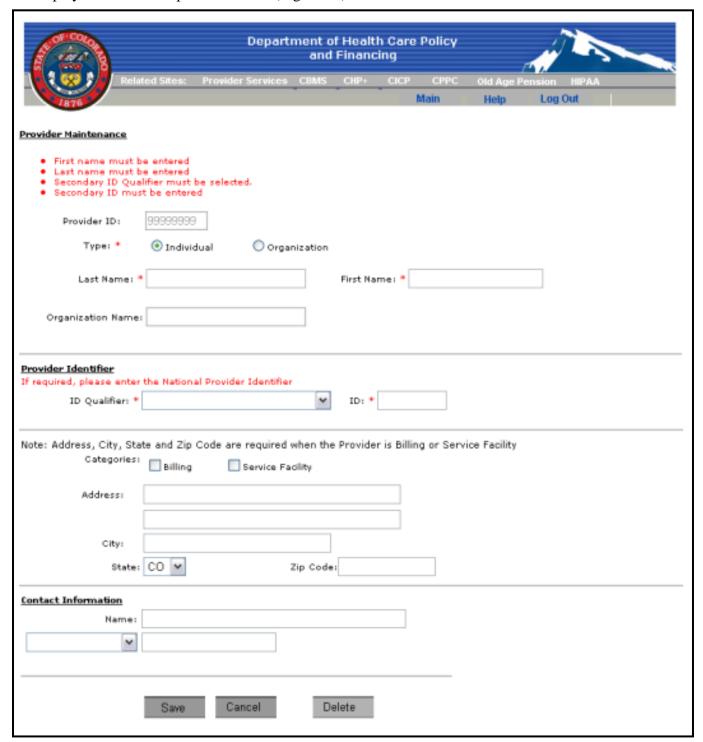


Figure 16 - Possible errors when adding a new provider

• Click on the Cancel button if you want to return to the Provider Lookup screen and not complete the request.

Medicaid Provider Lookup

The Medicaid Provider Lookup (Figure 17) allows you to query the most recent MMIS provider file to view provider information. Although you are not required to restrict your results using a search, it is recommended as the system will display the entire MMIS provider file if the **Search** button is clicked and no search criteria has been specified.

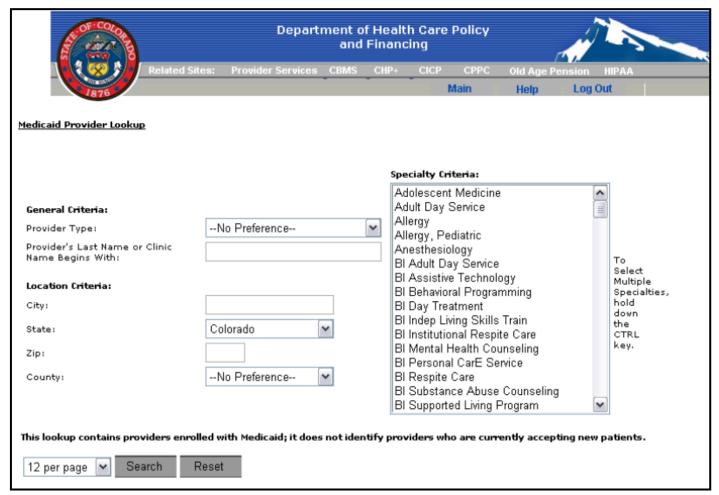


Figure 17 - Provider Specialty Lookup screen

To search for providers, three types of search criteria sections are provided. You can use all three at the same time or any combination of the three. The search criteria sections are:

General Criteria: This section provides for a search by Provider Type and the Provider's Last Name or Clinic Name Begins With.
 Location Criteria: This section provides for a search by City, State, Zip Code, and County.
 Specialty Criteria: This section provides for a search based on Specialty. Multiple specialties can be searched for at the same time by holding down the Ctrl key and clicking on the

specialties needed.

If a specific **Provider Type** is selected from the drop-down box, the specialties listed in the **Specialty Criteria** box will change to match the **Provider Type** chosen (Figure 18).

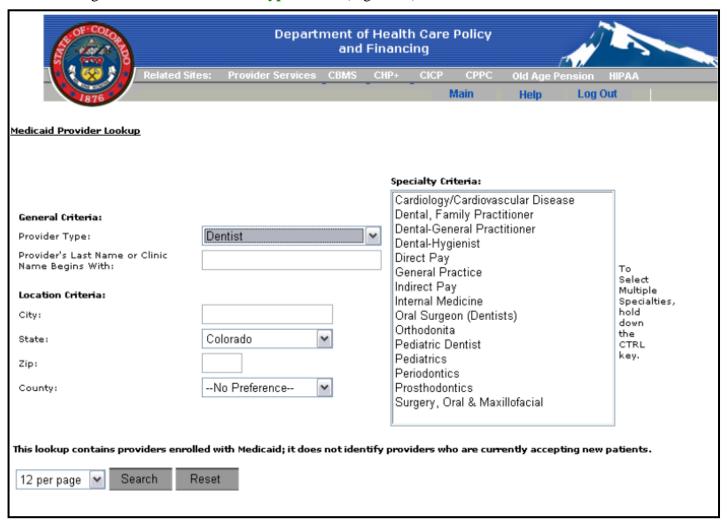


Figure 18 - Dental Provider Type with Dental specialties

If the search criteria you specify does not find any matching providers, a message will be displayed in red on the criteria screen stating that no providers matched (Figure 19).

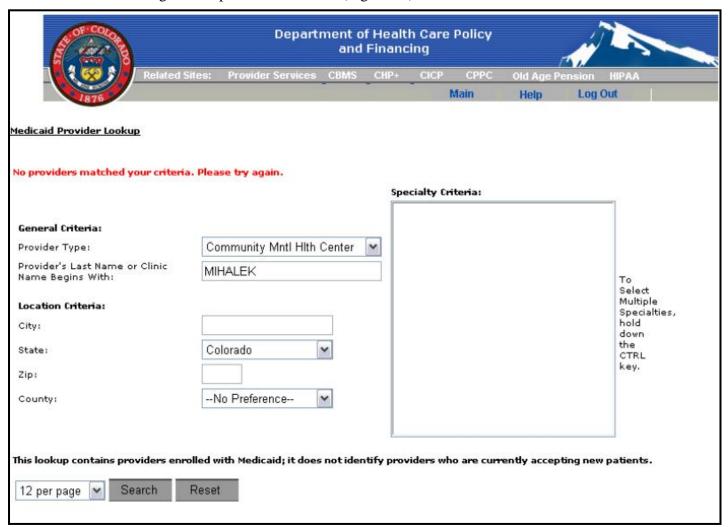


Figure 19 - Search resulting in no matching providers

Revise your search criteria and click on the **Search** button again to obtain new results.

The Provider Specialty Listing will display in a columnar format with the provider name, address and phone numbers (Figure 20).

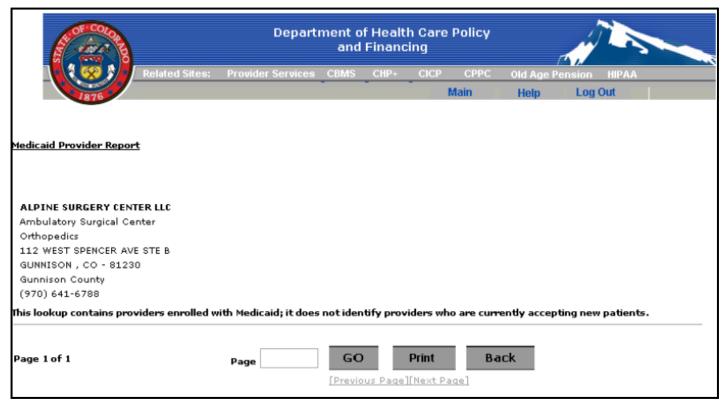


Figure 20 - Provider Specialty Listing

The list can be scrolled through by using the scroll bar located at the right of the screen, when applicable. Located at the bottom of the screen are navigational buttons and links to assist with paging through results and obtaining printed output of the listing. Click on the **Print** button to send the list to the printer. To return to the Provider Specialty Lookup screen, click on the **Back** button.

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